

How to Attach a Contact Record to a Service Record

Market: Federal/State/Local, House, Senate

Module: Services

Purpose: This guide provides instruction on how to attach an existing contact record or create a new contact record for

a service record.

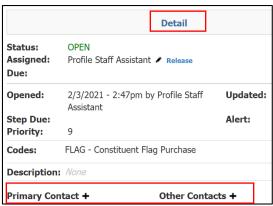
Key Benefits

By associating contact record(s) with a service record, you can easily create and send correspondence to the individual(s) while processing a service record. Thus, this is a time-saving technique.

IQ also provides flexibility to save different types of contacts to associate with a service record. The *Primary Contact* refers to the person who requested the service. *Other Contacts* refer to agency staff or other individuals who may be involved with the service.

- 1. Open an active service record.
- **2.** Select the option to add a contact record.

Option 1: Navigate to the **Details** section of the service record and click + **Primary Contact** or + **Other Contacts**.



Option 2: Click Actions on the service record page and select Attach Contacts or Attach Contacts by List. The latter is used when you want to access a list of contacts based on a criteria (i.e. contacts that have a common affiliation code).



3. A new window appears. Type or search the individual's name in the **Contact** field. If a new contact record does not exist in IQ, click **Add Contact.** To add a contact, refer to the **How to Create a Contact Record in IQ** Quick Reference Guide.



4. Click Attach.